



STATE OF WISCONSIN

Department of Employee Trust Funds

Eric O. Stanchfield

Secretary

801 West Badger Road

P.O. Box 7931

Madison, WI 53707-7931

APPLICANTS FOR TRUST FUNDS SPECIALIST 1 (Job Announcement Code: 0200245)

The enclosed application/examination materials are designed to obtain information about your skills, training, and experience relating to duties of a Trust Funds Specialist. Applicants will be added to the register to fill permanent vacancies that occur within Employee Trust Funds. The selection procedures used in filling Trust Funds Specialist 1 permanent positions will be as follows:

1. All interested candidates will be required to complete the enclosed Objective Inventory Questionnaire (OIQ). NOTE: This questionnaire constitutes an examination. Please read the instructions carefully on page 3.
2. Your qualifications at this phase of the examination process will be judged on the basis of the answers you provide to the OIQ. The most highly qualified candidates will be invited to compete in the next phase of the selection process. You may be asked to demonstrate or document the skill or experience level claimed on this questionnaire as part of the selection process.
3. Applicants will be added to the register (hiring list) within approximately one week of completed application materials being received. As permanent vacancies occur, the most highly qualified candidates will be certified and offered an interview. **Applicants will remain on the register for six months.**

FOR VETERAN APPLICANTS: If you are a veteran with an honorable discharge or a spouse of a veteran, you may be eligible to receive additional points on your civil service scores. Please view the Veterans Preference Supplement form DER-MRS-38L, found on-line at <http://der.state.wi.us/static/appmat.htm> and complete and return only if applicable. This form only needs to be submitted once, not for each position.

FOR DISABLED APPLICANTS: If you are a person with a disability you may be eligible for the Disabled Expanded Certification (DEC) program. Information on DEC and the form (DER-MRS-159) can be found on-line at <http://der.state.wi.us/static/appmat.htm>. This form does not need to be completed for each position.

Please mail all completed materials to: Department of Employee Trust Funds-Human Resources, PO Box 7931, 801 W. Badger Rd., Madison, WI 53707-7931. The complete list of application materials is listed on page six. If you have questions, please call me.

Cerry Hermosillo

Human Resources Assistant

Department of Employee Trust Funds

direct line 608-266-8585

toll-free 1-877-533-5020 ext. 68585

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Email: cerry.hermosillo@etf.state.wi.us

<http://etf.wi.gov>

**Trust Funds Specialist 1
Job Announcement Code: 0200245**

Certification Statement

Please read the following statements, sign below, fill out the information requested and return this form attached to your completed examination materials.

I understand that the Objective Inventory Questionnaire is a screening device used prior to the interview and that the practice or attempt to practice any deception or fraud will result in my application being withdrawn or that I will be removed from the position if I am hired.

WISCONSIN ADMINISTRATIVE CODE:

ER-MRS 6.10...The administrator may refuse...certify...or remove an applicant from a certification;

- (5) who has made a false statement of any material fact in any part of the selection process.
- (7) who practices, or attempts to practice, any deception or fraud in his or her application, certification, examination or in securing eligibility or appointment.
- (10) who has in any manner gained access to special or secret information regarding the content of an examination.

WISCONSIN STATUTES

Wis. Stats. § 230.43 Misdemeanors; how punished. (1) Obstruction or Falsification of Examination. Any person..(c) who willfully or corruptly makes any false representations concerning the same [examination]...or (d) who willfully or corruptly furnished any person any special or secret information... or (e)...shall for each offense be guilty of a misdemeanor.

(3) Penalty. Misdemeanors under this section are punishable by a fine of not less than \$50.00, nor more than \$1,000.00, or by imprisonment for not more than one year or both.

I certify that I have read and acknowledge that I understand the preceding two excerpts from the Wisconsin Administrative Code, ER-MRS 6.10, and Wisconsin Statutes, § 230.43 which relate to security of examination information and falsification of information in any part of the selection process. I also certify that my responses to the questions on this Achievement History Questionnaire are true to the best of my recollection and that I can document these experiences if required to do so at some future date.

SIGNATURE _____	DATE: _____
NAME (PRINT) _____	SSN: _____
ADDRESS _____	HOME () _____
CITY, STATE, ZIP _____	WORK () _____

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INSTRUCTIONS TO THE APPLICANT

- ⇒ The OIQ is designed to identify the level of training and experience you have related to this position. For each inventory item, choose the “Education and Training” AND “Professional Work Experience” criteria which best describes your experience.
- ⇒ Please be prepared in a subsequent stage of the selection process to demonstrate and verify your proficiency or competence level in any of the skills described in this questionnaire.

EDUCATION OR TRAINING (EDT)		PROFESSIONAL WORK EXPERIENCE (PWE)	
A	I have not been trained to perform this task or activity.	A	I have not performed this task or activity within the last 10 years.
B	I have informal training on performing this task or activity (e.g. self-taught)	B	I have performed this task or activity with assistance within the last 10 years.
C	I have formal academic classroom (training) on performing this task or activity (generally college, university).	C	I have performed this task or activity independently (without assistance) within the last 10 years.
D	I have received on-the-job training on performing this task or activity.	D	I have trained or led others to perform this task or activity within the last 10 years.

Example

	EDT		PWE	
1.	A	2.	A	Developed training/materials and visual aids.
3.	B	4.	C	Drafted detailed responses to complex inquiries.

This is a continuous recruitment and applications will continue to be accepted AND processed weekly until the needs of the Department are met.

Incomplete applications or materials that are not legible will not be processed and will be returned!

Questions regarding this examination may be directed to Marlene Lamb at (608) 266-5803.

Mailing instructions for completed materials are on page 6.

Applicant Last Name: _____

Section A: Benefit Plan or Program Counseling (Items 1-44)

I have provided personal counseling to individuals and/or other interested parties on the benefits, features, eligibility requirements, enrollment/application procedures and inter-relationships of complex benefit plans or programs including:

	EDT		PWE	
1.		2.		Retirement/pension plans
3.		4.		Long-term and short-term disability programs
5.		6.		Survivor (death) benefits
7.		8.		Tax-Deferred Compensation (Sect. 457, IRS code), Tax-Sheltered Annuity programs (Sect. 403b, IRS code) and/or other tax-sheltered retirement income programs
9.		10.		Employee Reimbursement Account programs, Flexible Spending Account programs or cafeteria plans, (Sect. 125, IRS code)
11.		12.		Medical insurance plans (e.g., health, dental, long term care, major medical, etc.)
13.		14.		Life insurance plans (e.g., whole life, term, accidental death, etc.)
15.		16.		Income protection (disability) insurance plans
17.		18.		Other insurance plans (e.g., auto, home, travel, etc.)
19.		20.		Workers Compensation and/or Unemployment Compensation programs
21.		22.		Other employee fringe benefit programs (e.g., vacation, sick leave, paid and unpaid leaves of absence, etc.)
23.		24.		Public assistance programs such as Medicaid, food stamps, etc.

I have counseled or advised individuals, groups and/or other interested parties on:

	EDT		PWE	
25.		26.		Wisconsin Retirement System (WRS) retirement benefits
27.		28.		Wisconsin Retirement System (WRS) disability benefits
29.		30.		Wisconsin Retirement System (WRS) group insurance benefits
31.		32.		State/federal laws, rules and regulations governing retirement, disability, group insurance or other benefit plans and programs
33.		34.		Retirement/disability benefit formulas and calculations
35.		36.		Completing benefit forms/applications
37.		38.		Choosing among multiple retirement annuity (payment) options
39.		40.		Taxability of retirement/disability distributions and other benefit payments
41.		42.		Division/distribution of retirement account balances as a result of divorce
43.		44.		Financial, retirement and/or estate planning

For all items, please select the "Education or Training" criteria AND the "Professional Work Experience" criteria that best describes your experience with each task or activity.

Applicant Last Name: _____

Section B: Communications (Items 45-56)

	EDT		PWE	
45.		46.		Developed/revised informational brochures, booklets, fact sheets and/or articles for publication and distribution to the general public or a large diverse population
47.		48.		Drafted/wrote detailed responses to complex inquiries
49.		50.		Drafted/wrote clear and concise explanations/interpretations of complicated policies, laws, rules or regulations for a lay person reader
51.		52.		Developed/implemented plans for communicating new or changing policies, plans or programs to the general public or a large diverse population
53.		54.		Developed training materials and visual aids
55.		56.		Interacted with other state agencies or organizations regarding program materials or information.

Section C: Customer Service (Items 57-78)

	EDT		PWE	
57.		58.		Handled high volume customer telephone inquiries
59.		60.		Explained complex information to customers and/or their authorized representatives via the telephone
61.		62.		Handled telephone calls from irate or distressed customers
63.		64.		Provided assistance/information to walk-in customers
65.		66.		Handled irate or distressed walk-in customers
67.		68.		Investigated and resolved customer problems or complaints
69.		70.		Assisted customers in following complicated instructions or procedures
71.		72.		Implemented customer service policies
73.		74.		Identified and reported customer service problems and inefficiencies
75.		76.		Recommended customer service improvements
77.		78.		Conducted and/or evaluated results of customer satisfaction surveys

Section D: Research, Analysis and Problem-Solving (Items 79-102)

	EDT		PWE	
79.		80.		Researched and analyzed Wisconsin State statutes/Administrative Code to determine appropriate and legal handling of issues or problems
81.		82.		Researched and analyzed current and historical policies, rules, regulations or practices to determine answers to complex inquiries and questions
83.		84.		Identified problems and recommended changes to policies, procedures or processing
85.		86.		Analyzed, planned and implemented new or changing policies, plans or programs
87.		88.		Collected and tabulated statistical data
89.		90.		Analyzed statistical data and prepared reports on findings/recommendations
91.		92.		Identified/established objectives for short-term and long-term projects

Applicant Last Name: _____

	EDT		PWE	
93.		94.		Prioritized and completed multiple assignments with overlapping tasks and independent goals/deadlines
95.		96.		Successfully met required deadlines (weekly, biweekly or monthly) for a project or process
97.		98.		Performed complex mathematical calculations or formulas
99.		100.		Calculated retirement or disability benefits involving multiple data factors that were different for each individual
101.		102.		Audited computations completed by other staff or by a computer program

Section E: Computer and Technical Skills (Items 103-120)

	EDT		PWE	
103.		104.		Served as a computer technical resource person for automation projects
105.		106.		Validated computer program acceptance through user testing
107.		108.		Used word processing software (e.g., Word Perfect, Word for Windows, etc.)
109.		110.		Used spreadsheet software (e.g., Lotus, Quattro Pro, Excel, etc.)
111.		112.		Used database software (e.g., Access, Paradox, etc.)
113.		114.		Used on-line worksheets or electronic workflow systems.
115.		116.		Used electronic mail, internet, intranet or other computer-link communications system
117.		118.		Audited computer system output reports and verified data, counts and totals
119.		120.		Identified computer system problems or inefficiencies

Your completed application/examination materials for the position of Trust Funds Specialist 1 should contain the following:

1. Application for State Employment (Form DER-MRS-38)
2. Veterans Preference Supplement (Form DER-MRS-38L), if applicable
3. Applicant Certification Statement
4. Completed Objective Inventory Questionnaire
5. Up to Date Resume

After completing all application/examination materials, please return to:

Department of Employee Trust Funds – Human Resources
P.O. Box 7931
801 W. Badger Road
Madison, WI 53707-7931
FAX: (608) 267-0633

It is a good idea to make a copy of your completed packet before returning it.

REV. 10/02